Senior Marketing Analyst Interview Deck

Advait Ramesh Iyer

Table of Contents

- 1. Executive Summary
- 2. Jane Payment Business
 - Accounts Distribution
 - Adoption & Activation Rate
 - Revenue & Payments
 - Churn & Retention
 - LTV & Payback Period
 - Strategic Opportunities
- 3. Acquisition Funnel Analysis
 - Business Context & Objective
 - Experimental Design Framework
 - Data Collection & Monitoring
 - Simulation Study
 - Key Recommendation
 - Additional Recommendations
- 4. Appendix

Executive Summary

Task 1

Focus on Retention Strategy in the US market

Even with adoption rates +7% vs. CA, accounts churn is +8% & subscription churn is +56%

Focus on Activation Strategy in CA market

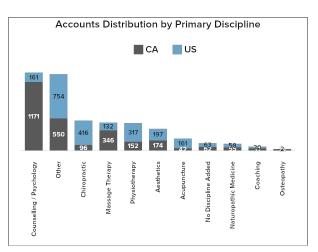
CA has a larger account base (54%), but lower adoption rate & +46% payments churn is causing opportunity loss in transaction revenue

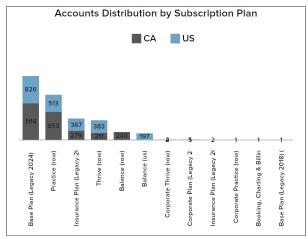
Task 2

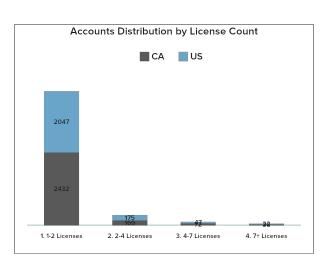
- Scaling email outreach to all leads may be the ideal strategy, due to highest ROI with zero cost
- Demo sessions may lead to high lift, but ROI maximization will only be possible with large clinics
- Robust lead scoring models
 alongside sales orchestration is
 fundamental to driving incremental
 revenue & higher ROI

Analysis of Jane Payment Business

Accounts Distribution

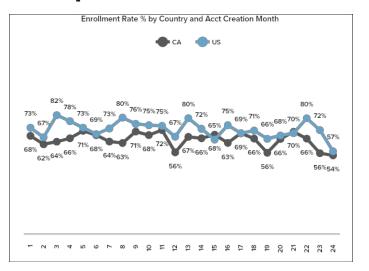


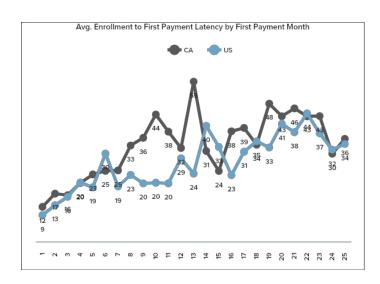




- CA has a larger population of accounts with:
 - 54% of all Accounts
 - 56% of all Active Accounts
 - 51% of all Payment Adopted Accounts
 - 52% of all Payment Activated Accounts

Adoption & Activation Rate

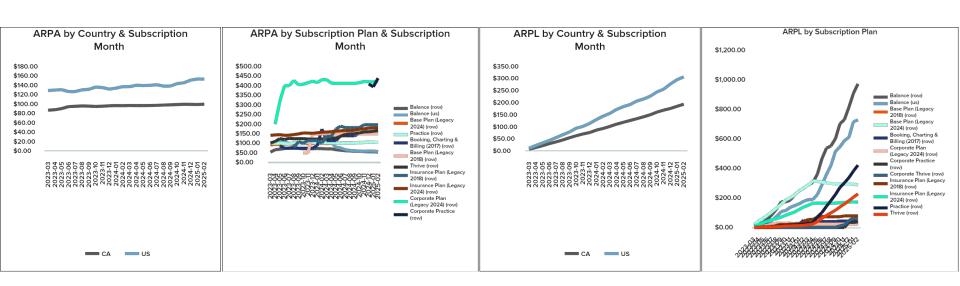




- More customers adopting Jane Payment in the US (+7%) vs. CA in 24 months
- Adoption to Activation has longer latency in CA (+24%) vs. US
- Acupuncture has longest Adoption to Activation latency across CA (51 days) & US (35 days)
- Naturopathic Medicine has shortest Adoption to Activation latency across CA (22 days) & US (25 days)

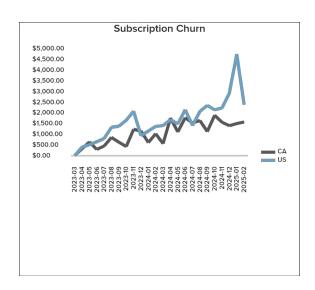
*Average Revenue per Account
**Average Revenue per License
Note: Considered only revenue through subscription

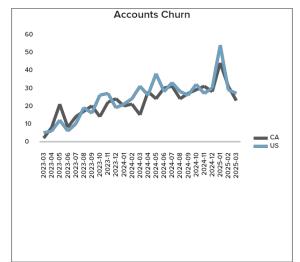
Revenue & Payments

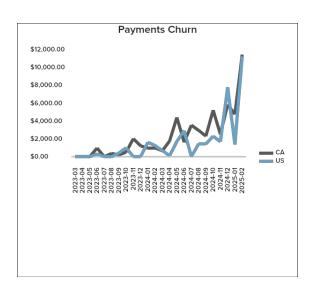


- US has both higher ARPA* (+55%) & ARPL** (+53%) in comparison to Canada
- ARPA is much higher for Corporate subscription plan due to higher mix of 10+ licenses
- ARPL is higher for Balance subscription plans due to 1 license per account

Churn & Retention



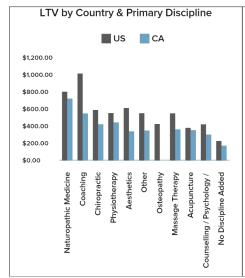


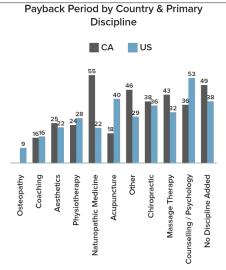


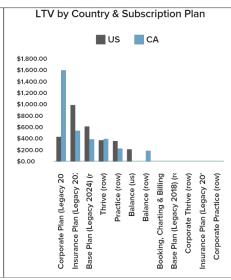
- Although enrollment rate in the US (+7%) vs. CA, there's +8% account churn and +56% subscription churn
- Payment churn is higher in CA (+46%) vs. US, implying account retention but not translating into payments

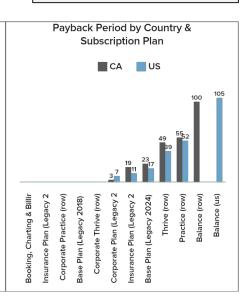
Assumptions:
CAC = \$400
Payment Revenue = 2.5% / transaction
Subscription Revenue = 100%
Gross Margin = 80%

LTV & Payback Period









- US has +67% higher LTV (\$548) vs. CA (\$328); CA has +19% longer payback period months (38) vs. US (32)
- At Primary Discipline & Subscription Plan levels, due to high imbalance of account volume segments, we may need more samples to gain higher confidence on estimated LTV and payback period

Strategic Recommendations

		Q2 2025	Q3 2025	Q4 2025
	Retention (US)	Launch Loyalty Programs Beta (exclusive discounts)	Win-back campaigns for churned users (special focus on Insurance plan*)	Launch VIP membership tiers (rewards, early access)
	Activation (CA)	Rollout Fast Activation Campaigns (early payment bonus)	Launch Bundle & Save offers (multi-license discount campaigns)	Launch Primary Discipline-specific campaigns
\$	Upsell (All)	Identify high-engagement solo users for upsell	Pilot reduced CAC offers (starter pricing for CA only)	Review LTV, payback period to optimize & scale pricing models
M	Data & Pricing Improvements		Pilot reduced CAC offers	(starter pricing for CA only)

^{*} Insurance Plan has highest LTV in US

Acquisition Funnel Analysis

Business Context & Objective

Context:

- All prospects are inbound leads
- "Click Sign-Up" to Account Conversion is 20%
- Conversion Latency for a cohort:
 - **10%** on same day
 - 8% over next two weeks
 - 2% from Day 15 Day 60

Operational Levers:

- Outreach Email (\$0)
- Outbound Call (\$40 / Call)
- Demo (\$100 / Session)

Prospect profiles & Revenue target:

- Small clinic (1-4 staff) = \$50 AMR*
- Mid-size/Large clinic (5+) = \$100 AMR

Objective:

- 1. Increase conversion rate to 20%+
- 2. Reduce "Click Sign-Up" to Account Conversion time

Experimental Design Framework

Pre-Launch	Day 0 - 7: Launch Week	Day 14 - 30: Interim Week	Day 60: Final Cohort Read
 Control (no intervention) Email follow-up Outbound call Demo offer Email + Call Call + Demo Size of groups = 1,667 (even split of 10,000) 	 Conversion % (early read) Time to sign-up (avg, median) Open/click rates for email Call/demo connect rates 	 Conversion % (should be ~18%) Intermediate lift % CAC (80-90% conversions done) 	 Final conversion % Final Lift % Time to sign-up (days) CAC

Data Collection & Monitoring

Metric	Use Case	How?	
Event/Data collection & Identity Resolution	Unify across web, product, CRM	Segment, Acxiom	
Data Warehouse	Store everything for analytics: IDs, timestamps, treatment assignments, clinic attributes Store everything for analytics: IDs, Snowflake, BigQuery, Reds		
CRM / Lead Enrichment	Capture account tiers, staff size, lead scoring, opportunity tracking	HubSpot, Salesforce	
Experiment Management & Attribution	Treatment assignment, cohort comparison, analytics Optimizely		
BI / Monitoring Dashboard	Daily/weekly cohort dashboards, CAC/ROI reporting, funnel breakdowns PowerBI, Tableau		

Simulation Study

Before Launch

Group	Leads	Expected Conversion Rate	Estimated CAC	Revenue Targeting
All Groups	1667	TBD	TBD	Mix of \$50 & \$100 per user

Launch Week (Day 0 – Day 7)

Group	Leads	Expected Conversion Rate	Avg. Days to Convert	Callouts
Control	1667	~167 (10%)	0	Passive behavior only
Email	1667	~200 (12%)	1-2	Slightly faster response
Call	1667	~250 (15%)	0-1	Accelerated decision making
Demo	1667	~280 (17%)	1-3	Post-interaction sign-up
Email + Call	1667	~260 (16%)	0-1	Urgency fulfilment
Call + Demo	1667	~300 (18%)	0-1	Impactful channels

Interim Monitoring (Day 14 – Day 30)

Group	Cumulative Conversions & Rate	CAC (Estimated)	Callouts
Control	~300 (18%)	\$O	Baseline
Email	~360 (22%)	\$O	Free lift, high margin
Call	~470 (28%)	~\$140	Effective for committed leads
Demo	~540 (32%)	~\$310	Expensive but good for high intent user
Email + Call	~490 (29%)	~\$140	Larger reach + persuasive
Call + Demo	~570 (34%)	~\$410	Expensive; best for large customers

Final Cohort Read (Day 60)

Group	Cumulative Conversions & Rate	Median Days to Convert	Callouts
Control	~333 (20%)	12	Baseline
Email	~383 (23%)	10	Accelerated by reach-outs
Call	~478 (29%)	6	Immediate conversion post-call
Demo	~550 (33%)	7	After delay but consistent
Email + Call	~500 (30%)	5	Highly accelerated
Call + Demo	~575 (35%)	5	Converts high intent quickly

Key Recommendation

Group	Strategic Recommendation
Email	High margin and ROICan be rolled out to all leads
Call	High influence, medium costGood for mid to large sized clinics
Demo	High effort, high costMay work very well on large sized clinics
Email + Call	 High intent leads, medium cost Lowest expected days to convert cycle
Call + Demo	 Very high cost, but low days to convert Ideal for enterprise clients intending to scale fast

Additional Recommendations

- Smart Targeting prioritize outreach based on higher ARPA (e.g., 5+ staff clinic)
- Segmentation develop lead scoring models:
 - Clinic size
 - Source channel
 - Engagement level (awareness, interaction, acquisition)
- Multi-channel Nurture Combine calls/emails/demos based on buyer level of intent
- Additional Incrementality tests:
 - Demo styles
 - Email content
 - SMS/Text follow-ups
- Synthetic A/B tests if complete randomization is not possible, works sequentially

Appendix

Question 1: Assumptions & Feature Engineering

Assumption 1:

The sample 5000 accounts are a good representative to Jane's customer base

Assumption 2:

CAC, Gross Margin, Transaction Revenue & Subscription Revenue are simplified and not necessarily true for the industry

Assumption 3:

While calculating LTV at Account ID level, the median LTV for lookalike segment is applied to Account IDs where LTV was not calculable

Assumption 4:

Activated customer is assumed to churn out of Payments if they haven't received payments in 2 consecutive months

Feature Engineering:

Converted the monthly payments (# & \$), and subscription \$ from columnar to row format

Q2. Metrics & Statistical Significance Measurement

- CAC = (Total Cost Incurred for the Group) / (Number of Users who Converted)
- Lift Evaluation Steps:
 - Openine H_0 (there is no difference between control & treatment) & H_1 (campaign causes a lift)
 - We consider variables like
 - \blacksquare P₀ = Baseline Conversion Rate
 - P₁ = Treatment Group Conversion Rate
 - \triangle = Absolute lift
 - n = sample size per group
 - α = Significance level (usually 0.05)
 - \blacksquare β = What % of time we will miss a lift; generally, power = $(1-\beta)$ is set to 80%
 - We run a two-proportion Z-test to confirm if we can reject the null hypothesis
- To run a robust A/B test, we require a higher sample size per group of \sim 2900 leads i.e., 2900 X 6 = 17,400 leads in total; we cannot detect \sim 3% lift at 80% power & 95% confidence with just 10,000 leads

Python Notebook:

https://colab.research.google.com/drive/1j5BhTMfFfT2ruXaaJT_IiU-fvSqNODAW#scrollTo=67bc96a8

Excel:

https://docs.google.com/spreadsheets/d/1jJ9LbeEnLdBsYpxtA8iqae0MnY h52Nt/edit?gid=118078777 #gid=118078777